



Client Advisor \$50 Gift Card Process

EVnation appreciates the support of dealership personnel (Client Advisors) who refer clients for EV charger installations. As a token of appreciation, we reward each successful referral with a \$50 Amazon Gift Card or Zelle payment upon the completion of the installation.

Step-by-Step Process

1. Advisor Contact Verification

- Confirm the Advisor's name, email, and cell phone in Pipedrive.
- If it's a new Advisor, call first to verify the phone number. Then send a text from the house phone to introduce the referral program.

2. Text or Email Script (To Be Sent Before Installation)

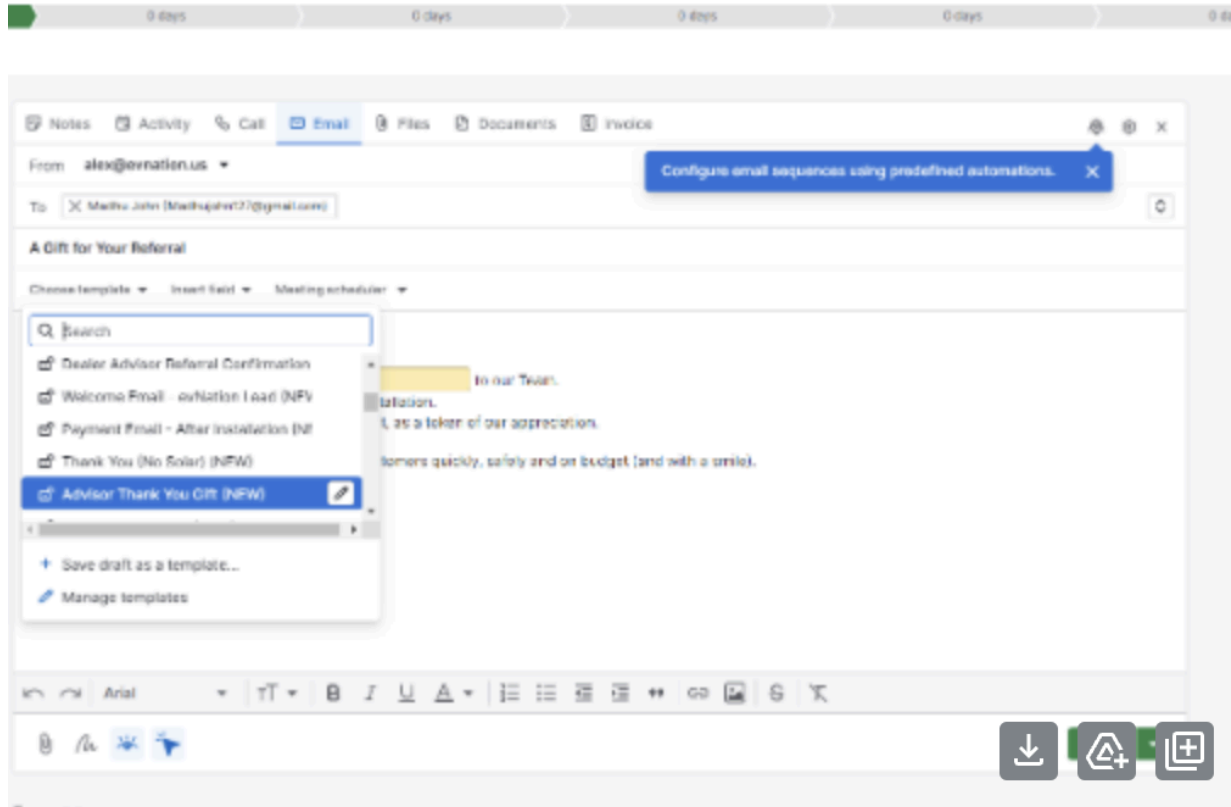
Example Message:

Hello [Advisor Name], this is [Your Name] with evNation.

We wanted to send you a gift once your client's installation is completed.

Thank you again for referring [Client Name] to us for their EV charger!

Is this the best number to send an Amazon Gift Card or Zelle payment?



3. After Installation Completion – Email Template

Subject: A Gift for Your Referral

Dear [Advisor Name],

A BIG thank you for referring [Client Name] to our Team.

We've successfully completed their Level 2 EV charger home installation.

Please look out for a text from Amazon with a small gift, as a token of our appreciation.

evNation is always ready to help your customers quickly, safely, and on budget (and with a smile).

— Neil Okun & Alex Livadas

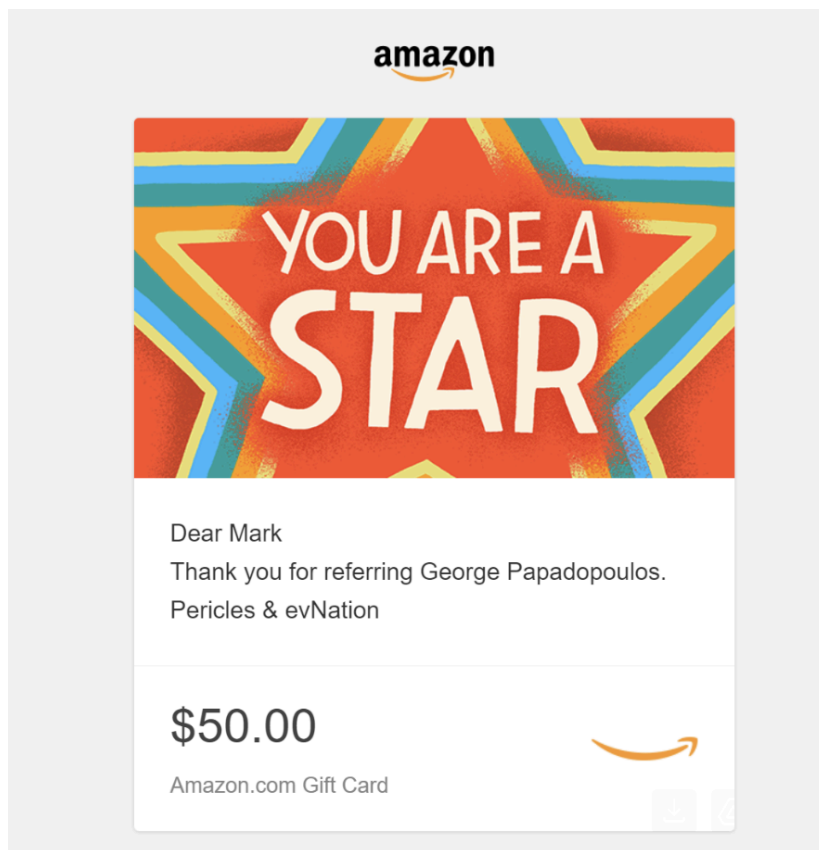
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4. Sending the Gift Card

1. In Pipedrive, access the Summary of the Day to review new and won leads.
2. Check installation notes in each “Won” deal to confirm completion.
3. Open the Client Referral Google Sheet and record:
 - Client Name
 - Date of Installation
 - Advisor Name
 - Dealership Name
 - Amount & Date Paid
4. Search for the Advisor by dealership in Pipedrive to retrieve their contact details.
5. Verify with a text or call that this number is good for sending the gift card.



5. Amazon Gift Card Text Format

Dear [Advisor Name],
Thank you for referring [Client Name] to us.
— [Your Name] @ evNation

6. Tracking & Payout

- Update the Google Sheet with date and payment status for each Advisor.
- Process and send all gift cards/spiffs every Friday for that week's installs.



Notes

- You may use Zelle instead of Amazon Gift Card if the Advisor prefers.
- Always verify the correct phone number before sending a gift.
- Ensure all interactions are tracked and transparent via Google Sheets.